

Organizing your personal research library and compiling bibliographies: I was an EndNote refusenik, but now I'm a Mendeley convert


by Blog Admin

August 20, 2012

*A key aspect of scholarship is how you create a personal research library, find and access your sources when needed, and cite them accurately and comprehensively. **Patrick Dunleavy** explains how the (relatively new) software Mendeley has transformed his previous time-consuming practice in just a few days, and solved numerous other problems of accessing literature and sources wherever he is. Mendeley can offer all academics and PhDs massive productivity gains.*



Until a few days ago the way I organized my research library was a bit chaotic, and doing references and bibliographies was always a huge chore that often took days at a time. Essentially I had hundreds and hundreds of PDFs, extracts from blogs and web pages, Word documents and presentations swilling around my hard drive. They were segmented into lots of different folders, sometimes with duplicates, often in the wrong place. They were variously titled depending on how rushed I was at the time I downloaded them and on how informative or useless the original file name had been. I could not overview all my literature files at once, and I usually had to remember which file I wanted and which sub-folder to look for it in order to have any hope of finding it. Sometime Microsoft's flakey search function found a word I'd remembered to put in the title, most times it didn't. (I still miss Google Desktop). When it came to compiling references and bibliographies, I usually had to cannibalize a previous listing (and re-format by hand for new citing requirements) and then roam around in Google Scholar and Google Books for all the extra stuff I knew I wanted but often could not find. In short, I was a referencing dinosaur.

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I rationalized this state of affairs to myself many different ways. I'm always in a rush and the thought of solemnly sitting down and re-typing all my references into EndNote just for the joy of having a single reference list that I could pull stuff off and re-format – well I could never find the time or summon the effort to do so much for so little return. Over the years I've 'evaluated' EndNote several times, but the interface for getting stuff in is so unbelievably poor I could never resolve to start. My key files are all on my home PC, and maybe I should have delegated the task to someone else – but given the state of things on my hard drives, it seemed a shame to let anyone else in on it. I insisted all my PhD students use EndNote, but this was very much a case of do what I say, not what I do.

Yet this situation has now been transformed by a great new piece of academic productivity software, **Mendeley**. If you know all about this already you can probably skip a few paragraphs here, but this is a blog for people like I used to be. In the space of a single day:

- I downloaded *Mendeley Desktop* and installed it on my primary home PC. I then found and uploaded 1,500 PDFs and other files (taking up 750 MB of data) from that PC onto Mendeley's massive 'cloud' database (using a not too fast BT internet);
- From there I downloaded the whole library to another PC. I also installed *Mendeley Light* on an iPad to view all the same materials. The software auto-synchronizes the contents of the library across all these places with a one-click button.
- I created a sensible set of folders and moved documents around in them, putting in some duplicates where needed to remind me of things, but all the time knowing that I could go to 'All Documents' and search the whole set of materials by numerous different fields – author, date, title, format etc.

- I very quickly and easily cleaned massive numbers of citation entries that Mendeley had extracted automatically from looking at the PDF metadata and at my previous file names. This editing process is radically simplified because Mendeley presents the whole document to you in the main window while you copy and paste details really fast into a sub-window on the right-hand side. I've still got work to do on getting perfect references, but I'm getting there.
- The following day I went into LSE, installed Mendeley (after approaching the IT services to get special permission) and then downloaded my whole research library from the Mendeley cloud to my work PC. I then added other stuff lurking on my work PC's hard drives, and in just a few minutes synchronized all my libraries with one click.
- For all this enormous functionality, I paid Mendeley nothing at all – the software is free and the data storage is also a free service for your first gigabyte.

Above all this though is the fact that Mendeley is so easy to use. Essentially you just go into a folder, select all the PDFs or other literature files and then move them en bloc to within the Mendeley main window – the software then auto-uploads everything that's just arrived on the database, in the process extracting titles, author details, journal titles, volume, issue and page numbers and for books publisher details. It also auto-classifies the item for you in all cases, and it picks up URLs and DOI numbers in most cases. If the original source PDF has good metadata, that's all you have to do. If not, it's a 20 second job usually to correct things.

All the PDFs you upload go on the Mendeley database, but if they were originally published in closed-access form, then they are only visible to and downloadable for you when you log on to Mendeley. However, the software also looks across the Web and finds free-to-access Web versions wherever it can – a huge advantage with Mendeley Light for iPad or smartphone, where only web-available versions of documents are reachable from the citation.

Mendeley also lets you create an instant public profile of your own publications, and the ease of doing this knocked me down with a feather. Go into your Google Scholar 'My Citations' page. [If you've not got a Citations page yet, where have you been living the last months? –see our [previous blog](#) on getting this done in five minutes]. Highlight all your publications and export them as Bibtex file that you save on your desktop. Now go into Mendeley to the folder called 'My Publications', which will be blank to start with. Move the Bibtex file into the Mendeley window – and voila! In about 1 minute I had 265 perfectly formatted citations from GSC up in my Mendeley profile and visible to the 2 million other Mendeley users worldwide – and indeed accessible on the open web via any search engine too. Of course, this is only the citations, and not the documents themselves. But I'm going to work through and see how many of these I can pull pre-prints or other legitimately free-to-access versions out and put them up.

I'm pretty clear already that Mendeley is a piece of software that everyone in academia – especially faculty, researchers and PhD students, but all students for that matter – need to review and see if it's right for them. Compared with EndNote or other old system that your university library is still supporting, you get the whole documents of your entire library (not just the citations), masses of free datastorage, and complete accessibility across all your PCs, iPads and smartphones. Compared with Dropbox or iCloud you get the huge functionality of referencing and citation details largely pre-completed. Compared with Google Scholar Updates, you get Mendeley recommendations of other literature that are based on your personal research library and not just your publications and citations: [Google Scholar Updates](#) works brilliantly for me, but I expect it will be less useful for people who've not yet published lots of stuff or accumulated many citations. There's also [Zotero](#) in this field, on which [an earlier post on this blog](#) has some useful information.

In a second follow-on blog next week we'll address some other issues around Mendeley, including why it looks like a start-up company that's going bigtime right now; what could be improved in what the software does; how you can use it for tracking impacts; how we might get university libraries and IT folk to wake up and start supporting it soon; and the 101 things I expect commenters to raise. For now, it will be interesting to get your feedback on Mendeley (only, please, not on my past slapdashness and long time lags in picking up new things!)

Note: This article gives the views of the author(s), and not the position of the Impact of Social Sciences blog, nor of the London School of Economics.

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